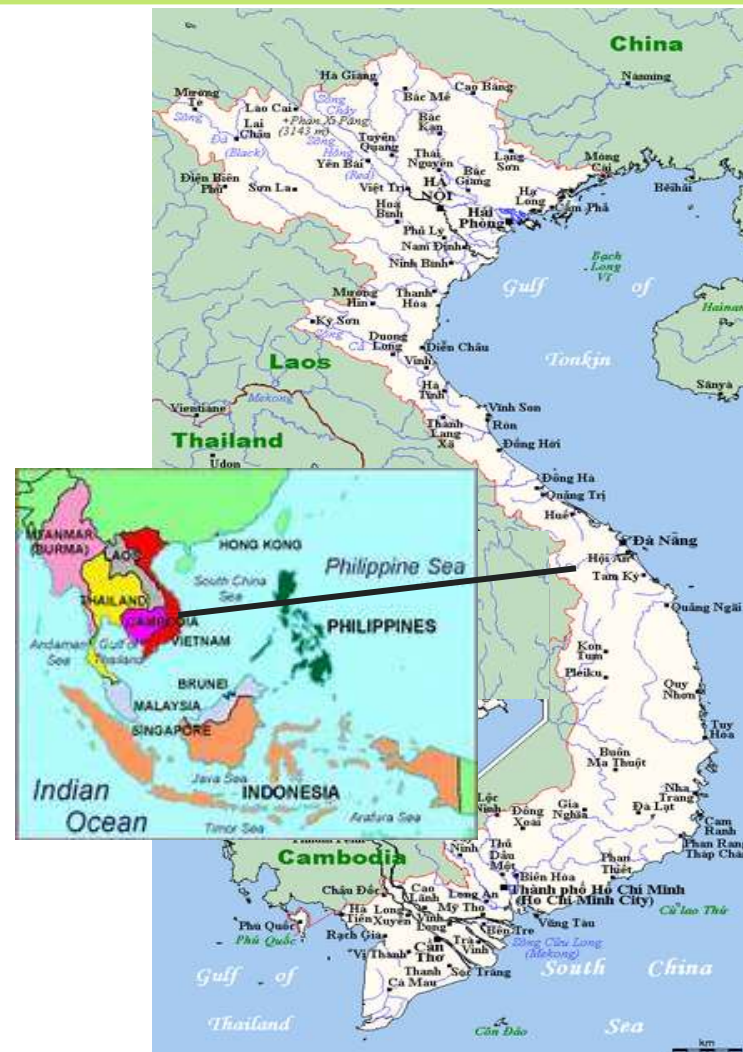


A Snapshot of Life and Media Use in Vietnam

Findings from the World Poll

Vietnam Surveys — Background and Conditions

- Since 2006: 8 annual national surveys of individuals aged 15 and older – 2 waves in 2012
- Nationally representative of more than 57 million Vietnamese
- Large “S” shaped country: about 200,000 square miles – 1025 miles north to south
- Geographic exclusions in 2012 of areas that were deemed unsafe or remote areas representing about 15% of the total population
- Sample size: 1,000 per year
- Face-to-face mode:
PAPI: 2006-2013



Conducting Survey Research in Vietnam

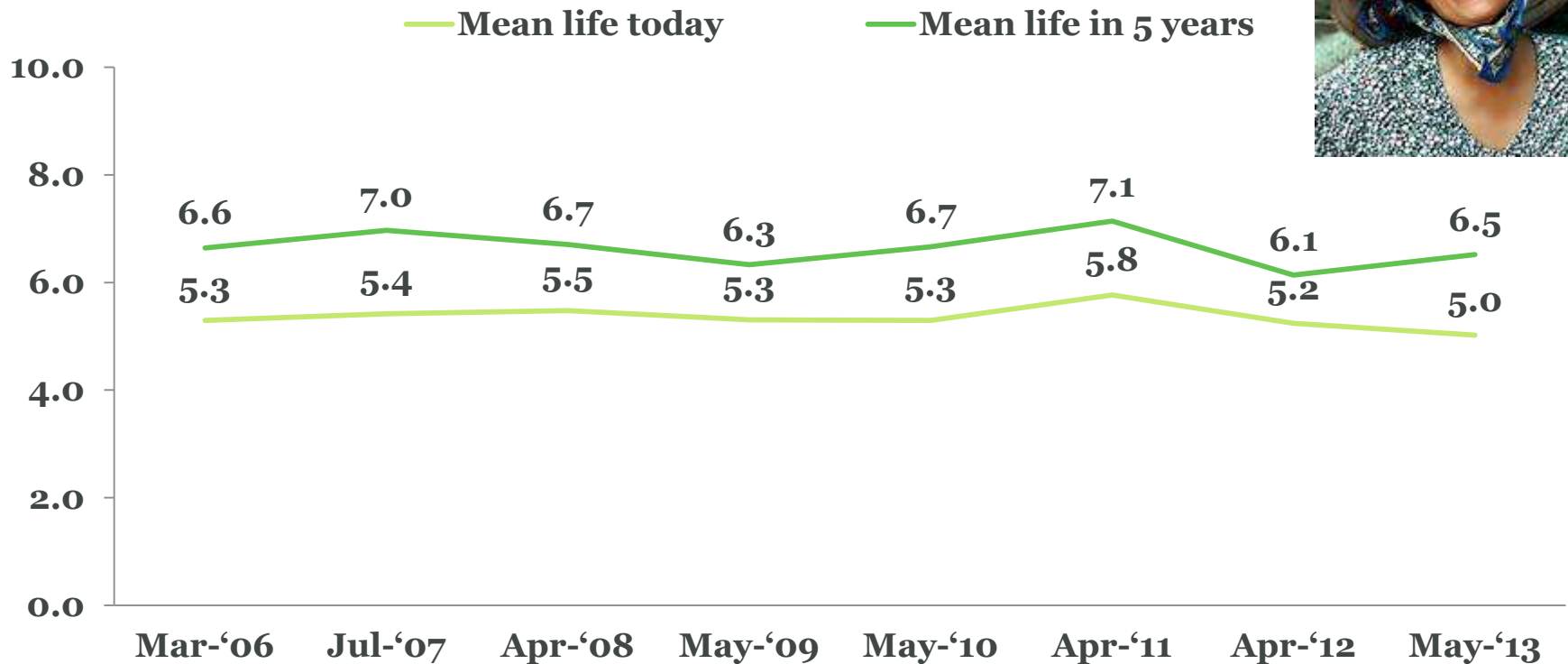
- Challenging transportation infrastructure
 - Far flung provinces with poor/no roads make travel difficult
 - From Cao Bang to Bac Kan, 14 hour bus ride over mountains
 - Interviewers walked 5-20 km to reach villages inaccessible by roads
- Weather exacerbates difficulties
 - Flooding makes in-person interviewing difficult
 - Oct – Apr central; May – Sep north & south



Vietnamese' Life Evaluation are Stable, But There is Hope for a Stronger Future

On which step of the ladder would you say you personally feel you stand at this time?

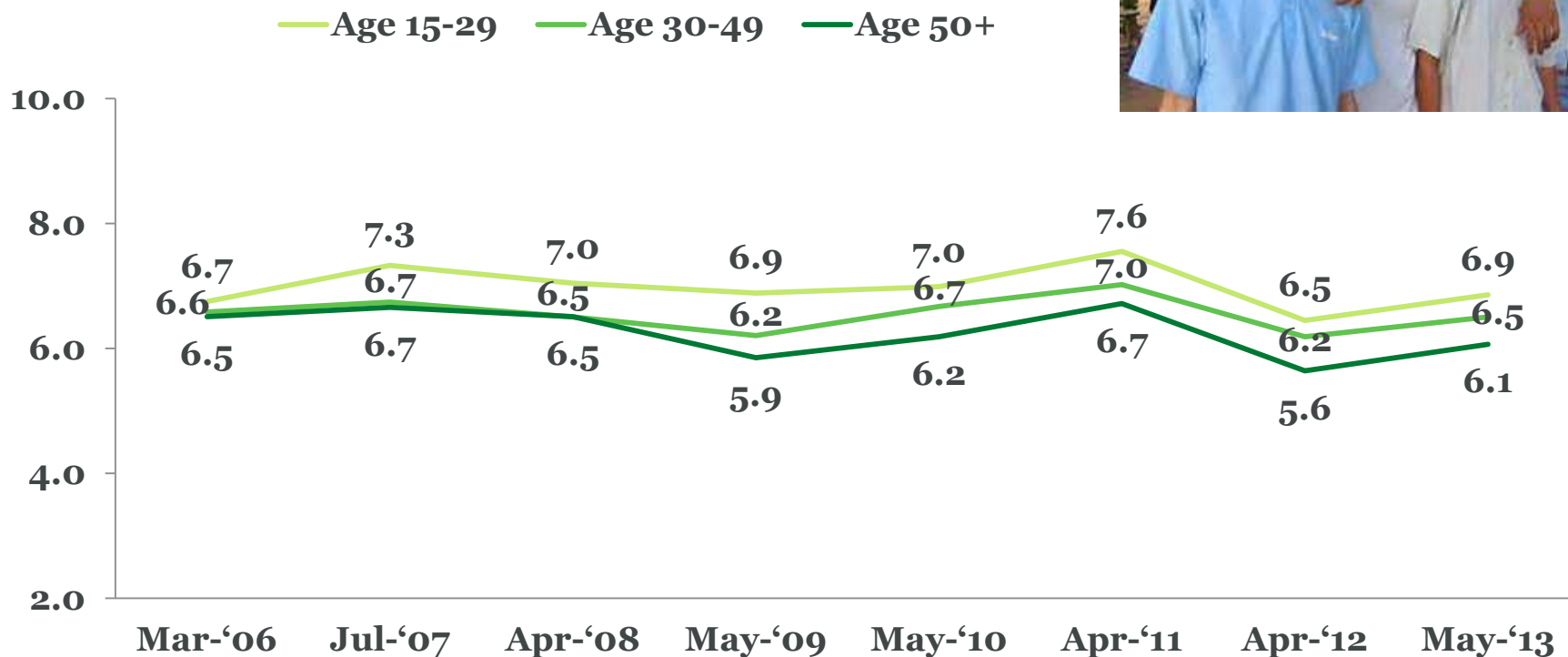
Just your best guess, on which step do you think you will stand in the future, say about five years from now?



Vietnamese Youth Have Stronger Hope for the Future

On which step of the ladder would you say you personally feel you stand at this time?

Just your best guess, on which step do you think you will stand in the future, say about five years from now?

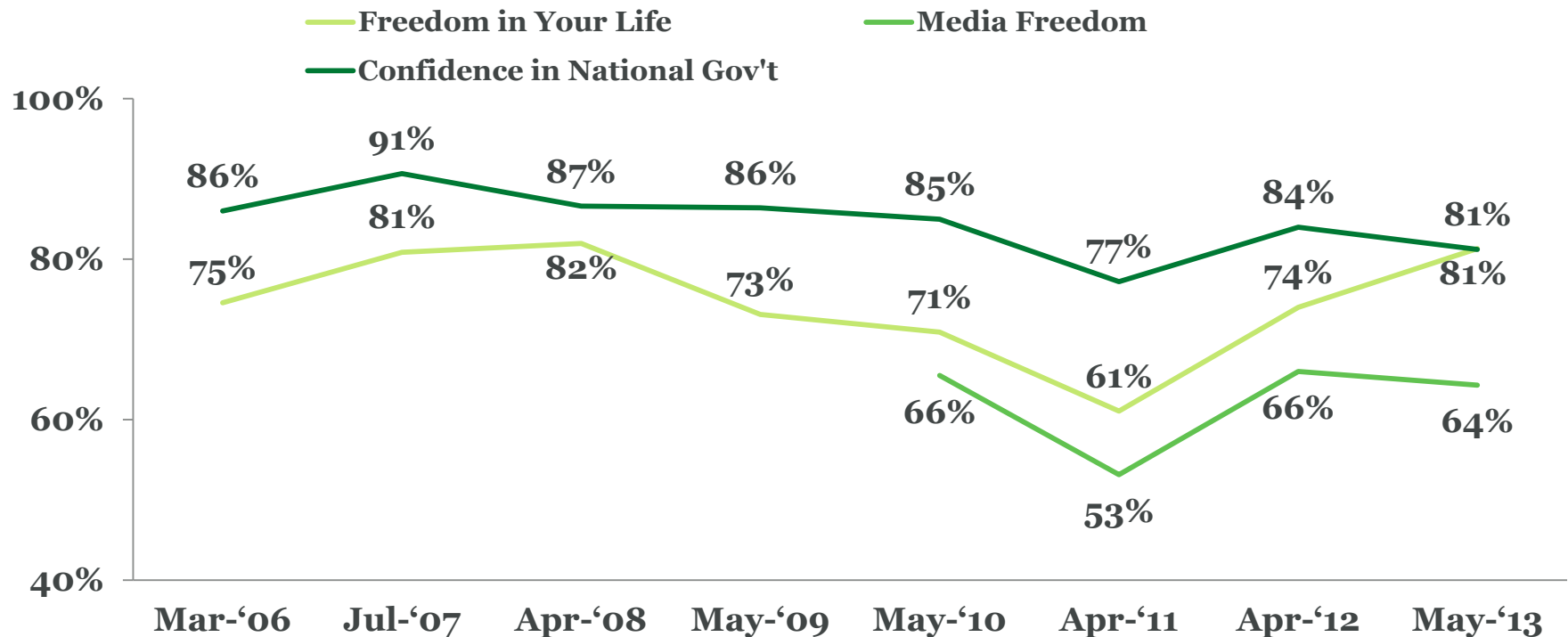


Strong Confidence in Government and Improving Perceptions of Personal Freedom

-In this country, are you satisfied or dissatisfied with your freedom to choose what you do with your life? (%Satisfied)

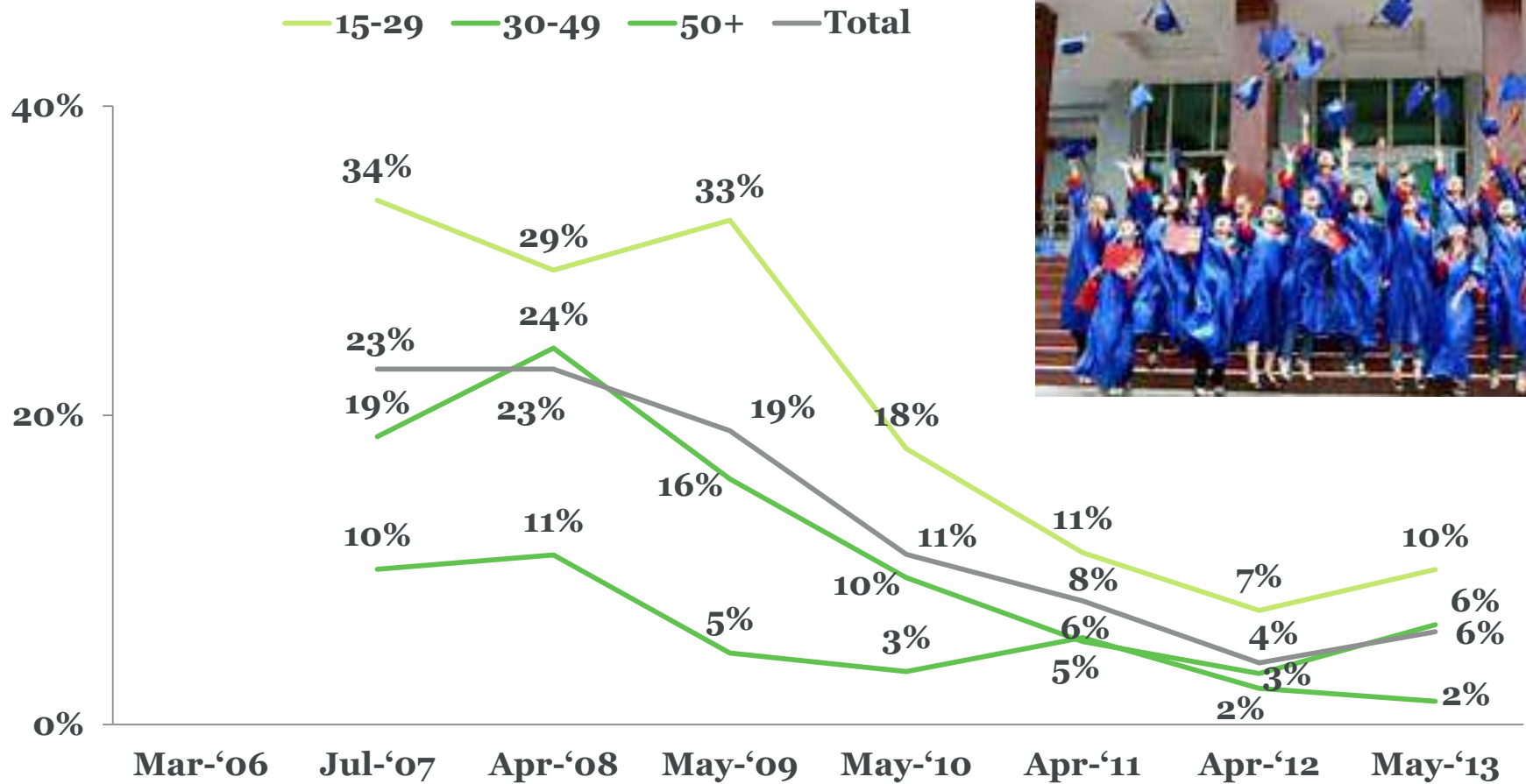
-Do the media in this country have a lot of freedom, or not? (%Yes)

-In this country, do you have confidence in the national government? (%Yes)



Youth Less Likely to Plan to Move to Another Country

Ideally, if you had the opportunity, would you like to move PERMANENTLY to another country, or would you prefer to continue living in this country? (% Likely to move)



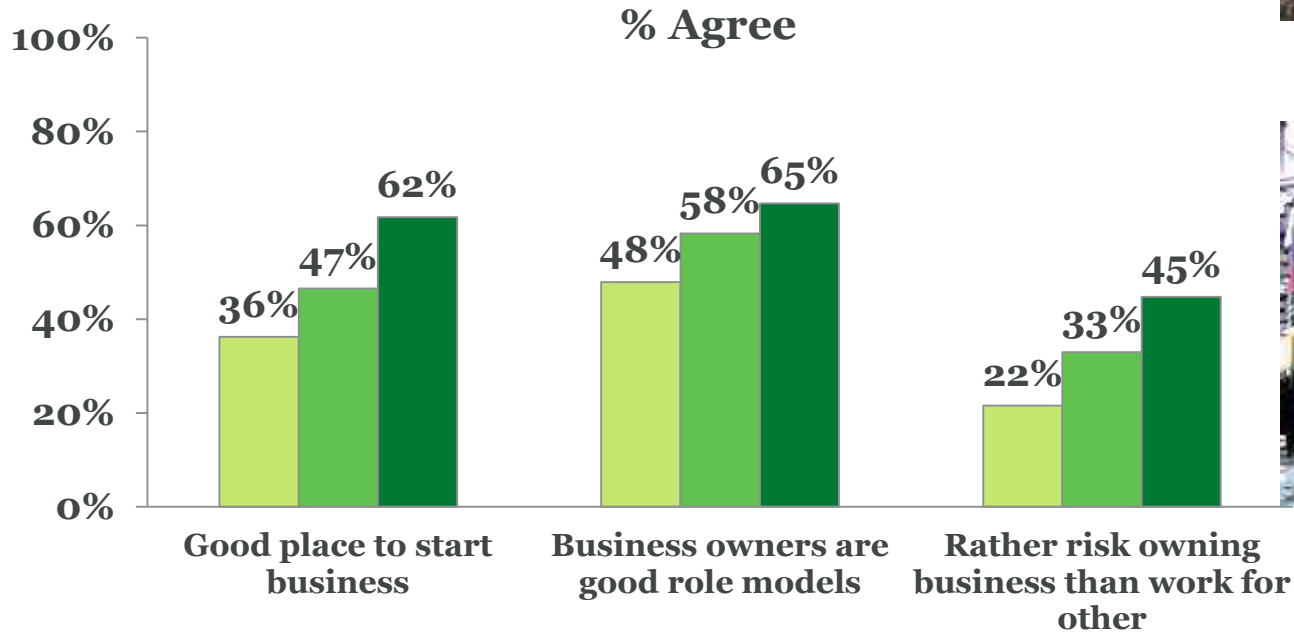
Entrepreneurial Spirit is Getting Stronger and Business Ownership is Looked Upon Favorably

-City or Area is good place for people starting new businesses.

-In Vietnam, are people who run their own businesses considered good role models for youth, or not ?

-You would rather take a risk and build your own business than work for someone else.

■ Apr-'11 ■ Apr-'12 ■ May-'13



BBG Survey in Vietnam

Media Environments



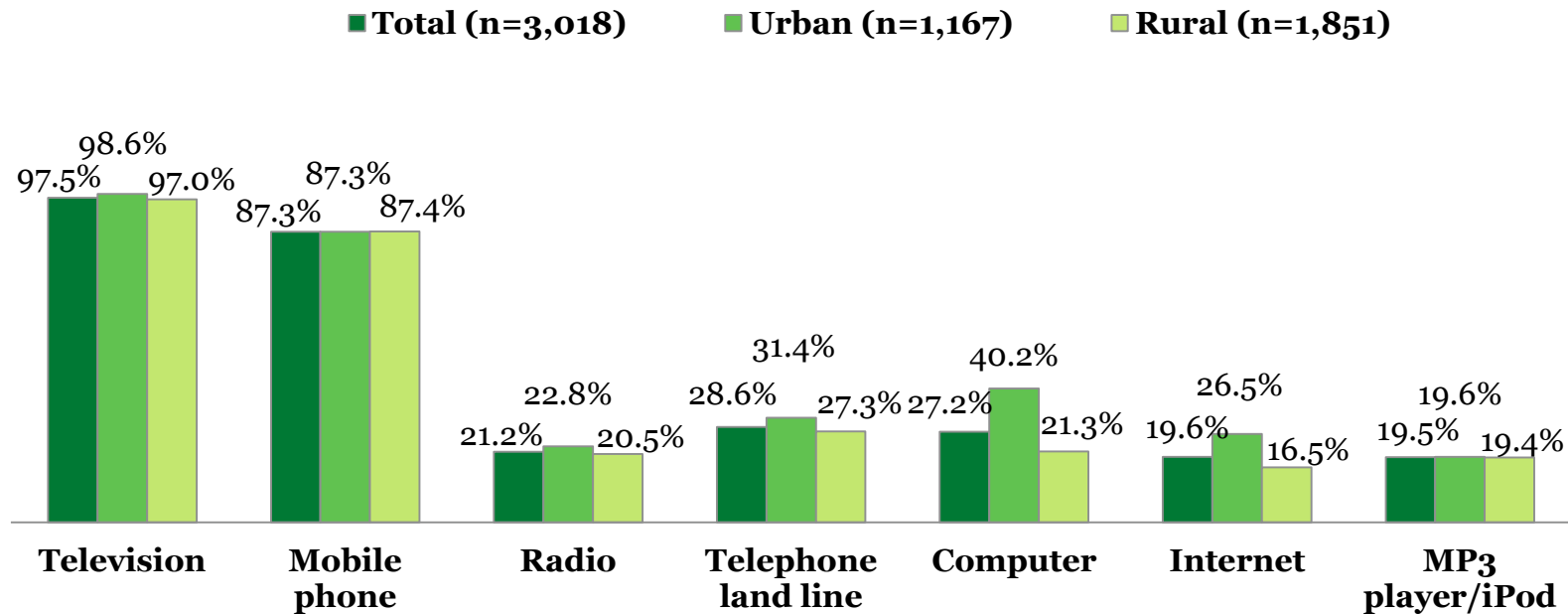
National Survey Background

- Face-to-face survey of 3,018 randomly selected Vietnamese adults (15+) covering 50 of Vietnam's 63 provinces and municipalities
- Nationally representative of more than 57 million Vietnamese
- Excluded some areas that were deemed unsafe or very remote minority areas representing about 15% of the population
- Conducted November 2012 – February 2013
- Highly detailed questionnaire
- Average length of successful questionnaire: 30 minutes
- 88.8% response rate



Television Ownership is Ubiquitous, Mobile is Close

Which of the following do you have working in your household?



- Tablets/iPads owned by 1.7%
- Gap between rural and urban areas closing – except for Web

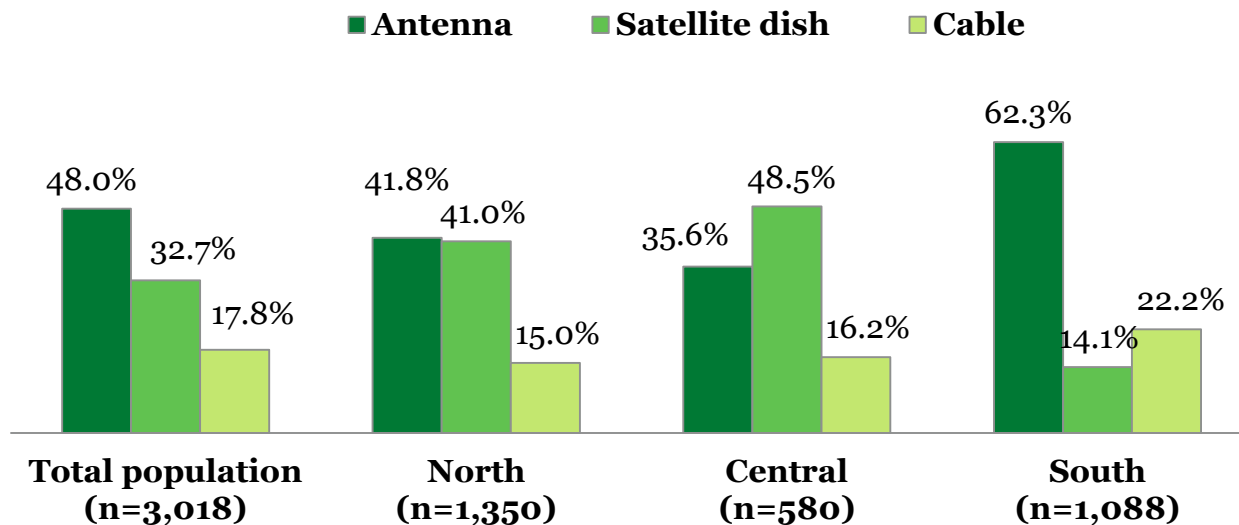
Radio use in Vietnam

- Less than 22% have radio; about 28% listened in last week
- Young, urban and educated listen somewhat more
- FM reaches at least 81% of regular radio listeners
- 54% of regular radio audience uses a mobile to listen; 34% use a satellite receiver
- SW, AM use very low



Regional Variation Exists in TV signal sources

How does your television receive its signal? (Results among all Vietnamese adults)



- Satellite more common in rural areas than cities
- Cable more common in cities than countryside
- In 2010, only 21% of households had a dish
- Vinasat the most common satellite provider, followed by Vietnam Television Corp (direct-to-home) and VSTV K+
- 94.6% of dishes are 1 meter or less



Vietnam Pay-TV Market Study (Qualitative)

Vietnam Has a Lively Multichannel TV Market

Cable TV



Direct-to-Home Satellite

Includes
“illegal” dishes



IPTV



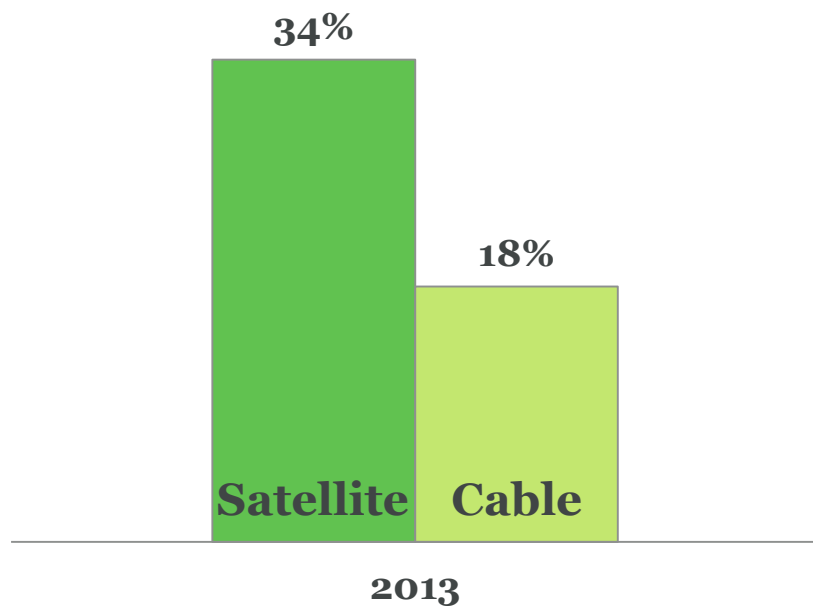
Vietnam's Multichannel Systems Carry International Channels

- Unlike China, international channels are available on cable, satellite, IPTV
- Like other Southeast Asian countries (Increasingly so)
- Discovery, CNN International, etc.



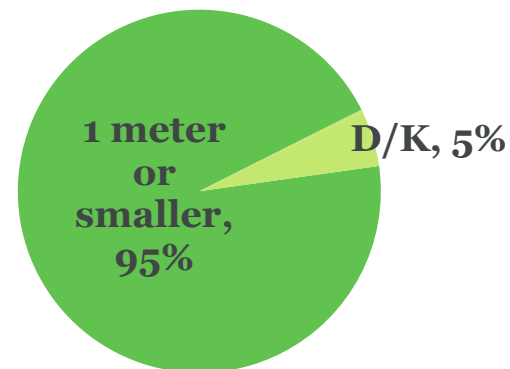
Landscape of Pay-TV Market

Pay-TV Ownership

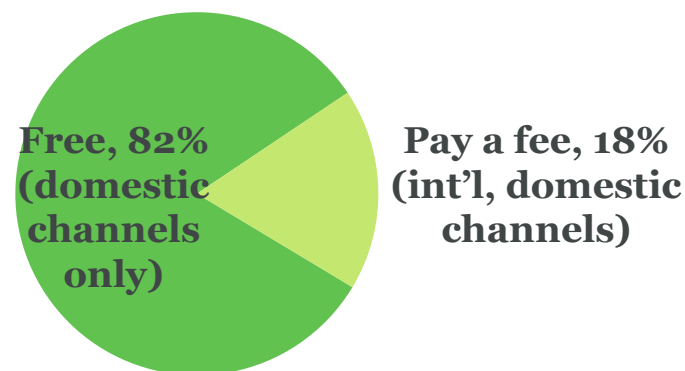


Base: Total respondents (2013, N=3,018)

Sizes of Satellite Dish



Subscription or Free



Base: Total individual satellite owners (2013, N=988)

Why the Study?

- Explore opportunities for international broadcasters
- What is the pay-tv market like?
 - Interest in international programs
 - Ways to reach television audience in Vietnam
 - Subtitles, dubbing?
 - Adjusting satellite equipment to receive international channels?

Whom Did We Talk To?

33 in-depth Interviews and in-home observations
across Cable, Satellite and IPTV



Consumers



Installers



Managers

The Study Covered 6 Cities and Provinces



I Want My TV

Where is the Cable Set-top-box?



Very Far Away from the TV Set ...



... and Shared with Many Neighbors



Got to Have My TV ...



... Even When I Don't Have Much



IPTV is Good, But too Expensive for Me

- High installation (US\$40-\$70) and monthly fees (US\$3-\$7)
 - Has an advantage over cable and satellite with bundled services
 - Available in both rural and urban areas
- IPTV is a platform to watch over the next few years as Internet becomes more pervasive in rural locations

I Just Want to Be a Couch Potato

- Vietnamese satellite viewers are content with what they have
 - They are not aware nor willing to adjust satellite dish or tuner to receive international channels outside of their package.
 - For both paid and non-paid subscribers

Subtitles and Dubbing

Some Content on Some International Channels is Translated by Subtitles or Dubbing

Fox Family Movies



Star World



Some Channels Have Some Programs with Subtitles

TV5 Monde Asie



MTV



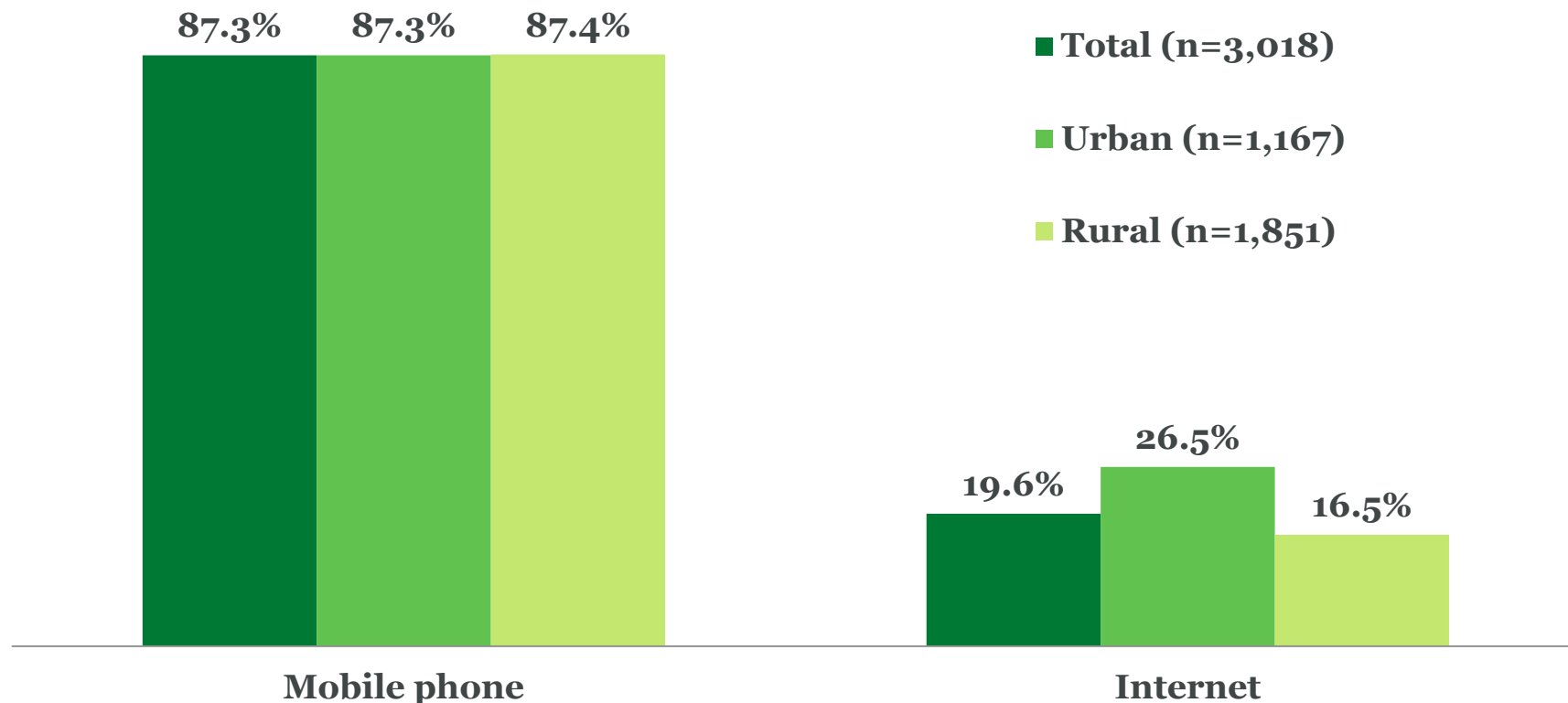
“Decision 20”

- Requires international channels to be translated and edited, to facilitate tighter control of contents distributed
 - ... but expands reach of international channels among larger Vietnamese audiences
- International news channels
 - Previously exempted from the requirement
 - After much negotiations, CNN will be obtaining its “editing license”

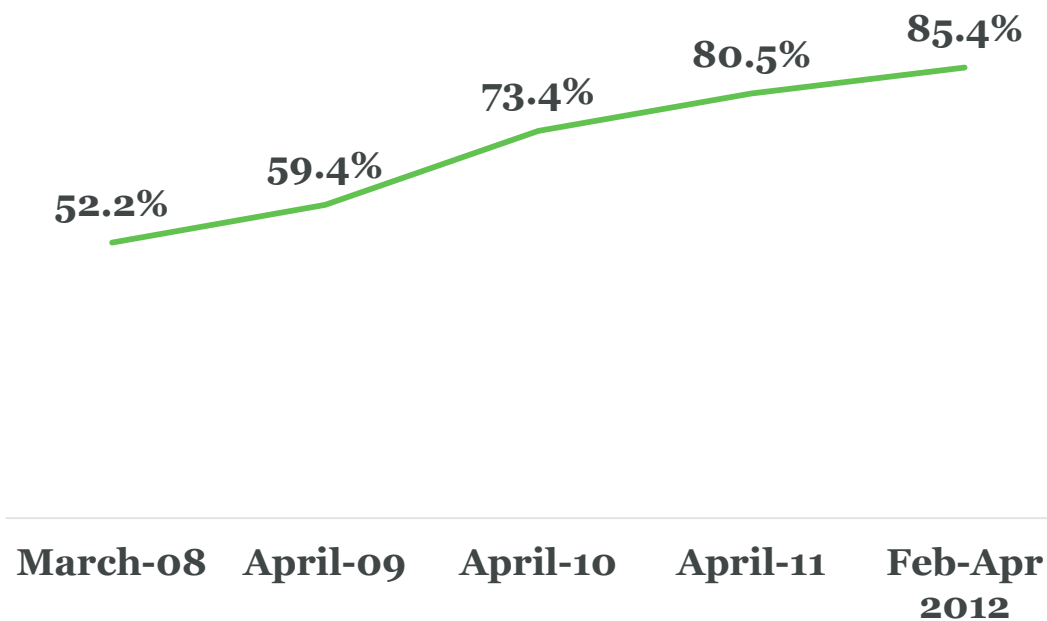
Other Media Access

Household Access to Digital Media

Which of the following do you have working in your household?



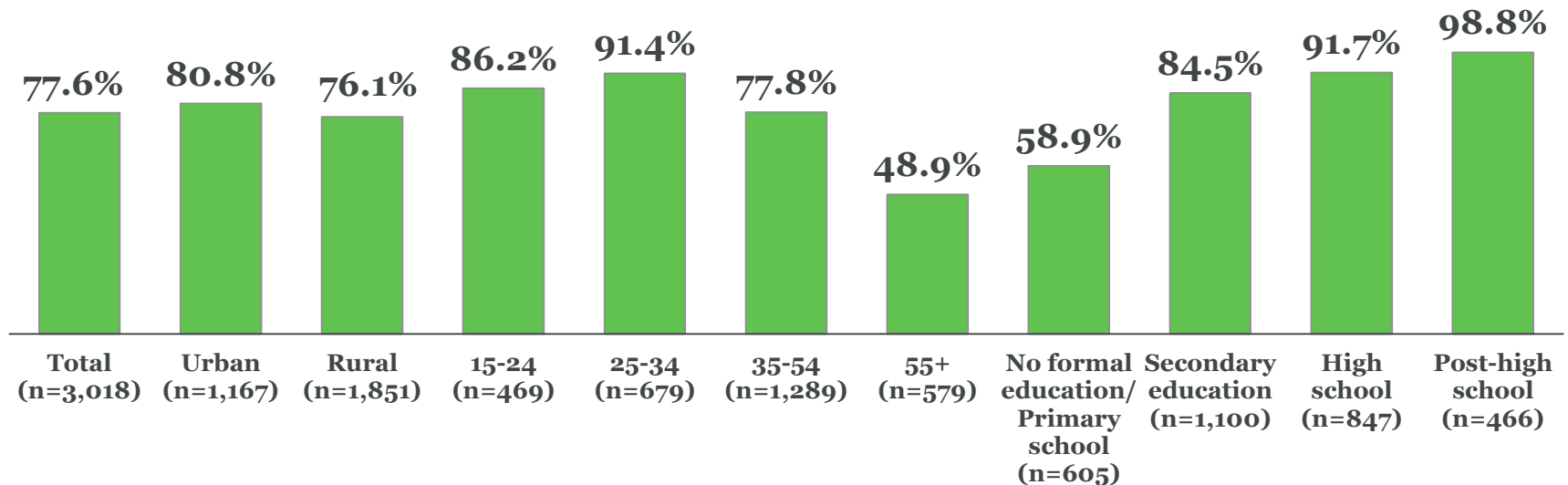
Digital Media Access



- Based on Gallup World Poll results, 2008-2012; n=approx. 1,000 per year
- BBG November 2012 survey ownership: household 87.3%, individual 77.6%

Personal Ownership of Mobile Phones Almost Universal Among Educated

Do you, yourself, have a mobile phone, or not? Percentage “yes”



- 27.5% of mobile owners (21.3% of all Vietnamese adults) have web-capable phones
- Internet-capable phones most likely be to owned by those under 25
- 51% of web-capable phones Nokia (Samsung 13%; Apple 7%)

Educated Youth Fueling new Media on Mobile

Mobile activities in the past 7 days among weekly users	Total (n=2,485)	High school education or less (n=2,025)	Post-high school education (n=460)	15-24 (n=413)	25-34 (n=638)	35-54 (n=1,097)	55+ (n=335)
Sent/Received SMS text messages	67.3%	62.1%	90.4%	92.0%	79.8%	53.1%	26.1%
Accessed the Internet	22.4%	15.5%	53.2%	50.0%	25.9%	6.1%	1.2%
Listened to the radio	18.8%	14.6%	37.5%	38.2%	19.1%	8.4%	4.5%
Accessed a social networking site	14.5%	8.5%	41.2%	38.0%	12.6%	2.5%	0.8%
Sent a photo to other people	12.4%	9.0%	27.2%	31.7%	10.9%	2.4%	1.0%
Downloaded or used a mobile app	11.4%	7.7%	28.1%	27.1%	12.5%	2.3%	0.7%
Downloaded and viewed a video clip	10.9%	7.5%	26.2%	24.4%	12.8%	2.7%	0.6%
Sent/received instant messages	8.4%	5.6%	20.8%	21.3%	8.2%	1.4%	0.3%
Sent or received an email	4.1%	2.1%	12.9%	8.7%	5.1%	1.1%	0.2%
Watched live television	3.5%	2.6%	7.6%	7.8%	4.2%	0.9%	0.2%

Top Social Media Sites

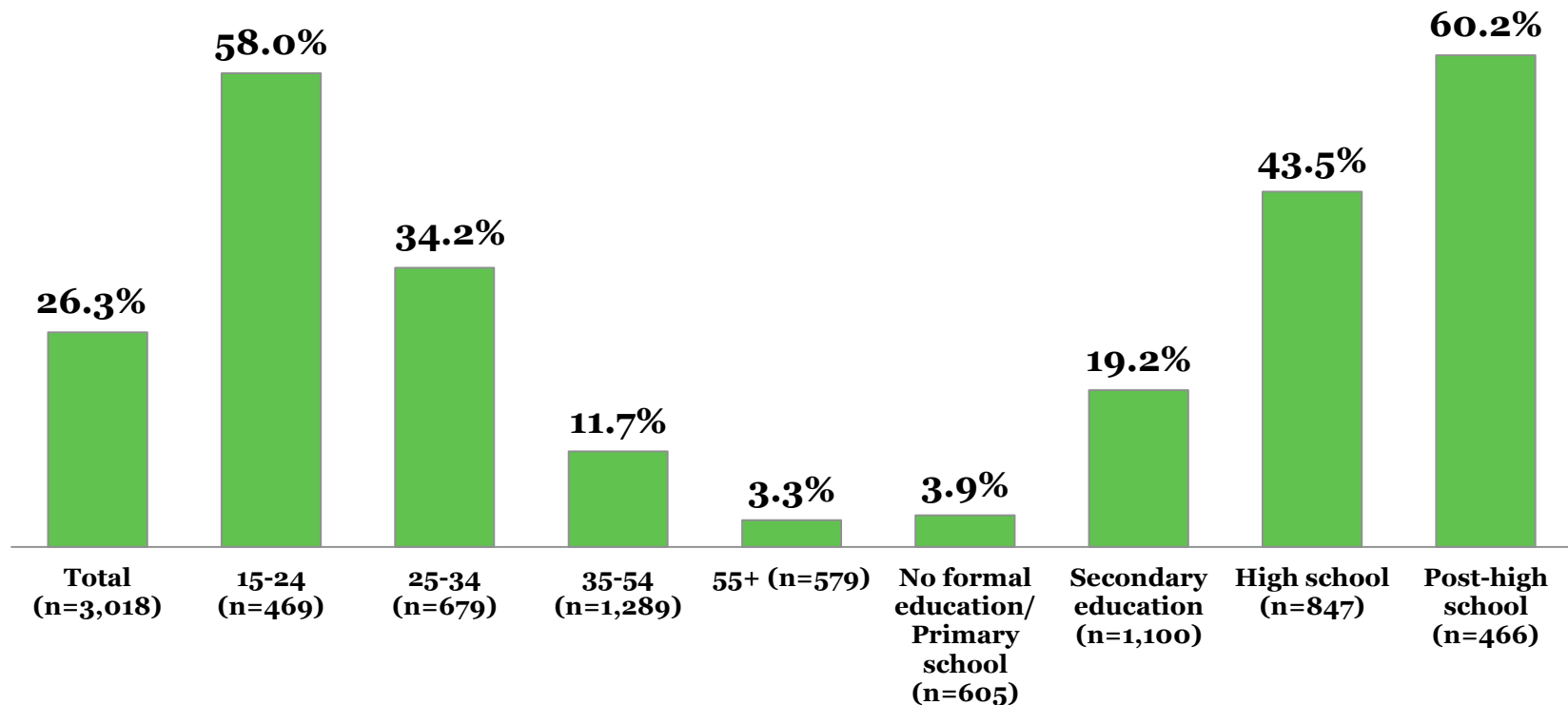
Which of the following services have you used in the past 7 days for social networking?

Service	General population (n=3,018)	Past-week users of social networking sites (n=681)
Google+	17.1%	72.2%
Facebook	15.5%	65.4%
YouTube	15.3%	64.7%
Zing/Zing me	13.5%	57.2%
Yahoo! 360+	11.3%	48.0%
Hi5	1.6%	6.6%
Tamtay.vn	1.5%	6.5%
Twitter	1.4%	5.8%
LinkedIn	0.8%	3.2%

- About one quarter of the adult population uses social media weekly
- Three quarters of urban youth

Internet use More Common Among Young and Educated

Past-week Internet use among selected demographic groups



Home Internet use Most Common

In which of the following locations do you use the Internet? Results among past-week internet users (n=794)

At home	82.6%
At various locations through a mobile phone or other handheld device	36.8%
Elsewhere	25.7%
At work	21.4%
At school/university	19.8%
At various locations through a laptop with WiFi	14.0%
At an Internet café	12.7%



News Seeking, Audio, Video top Uses of Web

Internet activity in the last 7 days	Total (n=794)	High school education or less (n=468)	Post-high school education (n=326)	15-24 (n=287)	25-34 (n=258)	35+ (n=248)
To find out the latest news	93.6%	91.9%	96.1%	95.9%	90.7%	91.3%
To listen to online audio	79.0%	78.7%	79.5%	88.4%	73.0%	60.1%
To find information online about a specific topic	78.3%	73.7%	84.7%	78.9%	79.8%	74.4%
To watch online videos	71.2%	68.9%	74.3%	77.5%	70.7%	52.9%
To send or receive email	37.5%	22.5%	58.2%	39.0%	39.6%	30.1%
To share videos or photos online	27.3%	22.9%	33.5%	35.7%	22.7%	9.5%
To read a blog	14.7%	11.4%	19.4%	19.3%	12.8%	4.2%
To download, watch or listen to a podcast	10.3%	7.8%	13.9%	12.2%	11.8%	2.7%
To post a comment on a blog	7.5%	5.6%	10.1%	9.8%	7.3%	1.2%

(n=794)

Website Reach Among Past Week Internet Users:

Website	General population (n=3,018)	Past-week Internet users (n=794)
Google.vn	24.5%	88.9%
24 Gio	15.3%	56.6%
Yahoo.vn	14.1%	52.0%
Dantri.com.vn	12.6%	46.9%
Vietnam Net	10.8%	40.0%
Tuoitre	9.9%	35.7%
Bao Thanh Niet	9.3%	34.1%
VN Express	8.5%	31.4%
Tin Tuc Online	8.2%	29.5%
Kenh 14	6.1%	22.7%
Bao Ngoi Saio	3.8%	14.1%

- Qualitative research finds Google a critical link to uncensored news
- English used by only 12% of web users

News in Vietnam



Daily use of Various Sources for News

	All Vietnamese (n=3,018)	Urban areas (n=1,167)	Rural areas (n=1,851)
TV	90.8%	92.3%	90.1%
Friends/family members	64.3%	63.2%	64.8%
SMS	30.7%	30.5%	30.7%
Internet	20.5%	29.8%	16.2%
Radio	17.9%	17.4%	18.0%
Newspapers/magazines	14.6%	19.6%	12.3%
Social networking sites	11.7%	15.0%	10.2%
Mobile apps	10.7%	10.5%	10.8%

VTV the Overwhelming top Source for News

Which stations, publications, or sites are your three MOST important sources of information?(unprompted)

Outlet	First response	Outlet	Net of three responses
Vietnam TV (VTV)	55.3%	Vietnam TV (VTV)	67.7%
Ho Chi Minh City TV	6.5%	Ho Chi Minh City TV	9.3%
Vietnam Television Corp.	2.7%	Vietnam Television Corp.	5.4%
Google.vn	2.0%	Google.vn	5.7%
Dantri.com.vn	1.5%	Dantri.com.vn	4.5%
24 Gio (Internet site)	1.4%	24 Gio (Internet site)	4.2%
Facebook	1.4%	Facebook	3.4%
Tuoi Tre	0.7%	Tuoi Tre	1.5%
VN Express	0.6%	VN Express	1.6%
Your provincial TV station	0.4%	Your provincial TV station	2.0%

Topic of Greatest Interest: Weather!

Percent somewhat or very interested in topics, by age.

	Total (n=3,018)	15-24 (n=469)	25-34 (n=679)	35-54 (n=1,289)	55+ (n=579)
Weather reports and forecasts	86.2%	82.1%	83.4%	89.4%	88.5%
Health and healthcare	83.7%	75.4%	81.7%	86.3%	92.2%
Education	79.3%	78.5%	81.6%	81.7%	73.1%
Environment issues	73.7%	70.5%	73.2%	75.8%	74.3%
Arts and culture	71.4%	78.4%	72.3%	67.7%	68.4%
Political news	63.4%	55.9%	65.0%	68.6%	61.7%
Business news and the economy	62.2%	57.1%	68.6%	66.0%	53.9%
Sports	46.0%	50.6%	48.1%	43.2%	43.1%
Science, technology, and IT	49.6%	63.2%	49.6%	46.3%	37.2%
Religion	39.5%	36.0%	33.2%	41.9%	46.7%

Please Tell me the Most Serious Problems Facing Vietnam (unprompted, first response)

Environmental problems	10.7%
Chinese territorial claims	10.7%
Crime/insecurity/lack of safety	5.2%
Poverty	4.6%
Corruption	2.7%
Rising food prices	2.6%
Unemployment/Lack of jobs	2.4%
Education/illiteracy	1.8%
Drug use	0.8%
Water/sanitation	0.9%



Closing Thoughts

- Vietnam is changing rapidly
 - Attitudinal, socio-economic and media usage
- Traditional media, especially television, is still dominant
- New media is pushed forward by young people and those with the most education
 - Urban-rural divides in media use are closing
 - Internet has overtaken radio as key news source
 - Google is a critical tool
- How to reach Vietnamese Audiences
 - Find ways to share content that is most important to residents
 - Look to new media and focus on engagement and sharing
 - Optimize placement on search results



Upcoming BBG Research Series events:

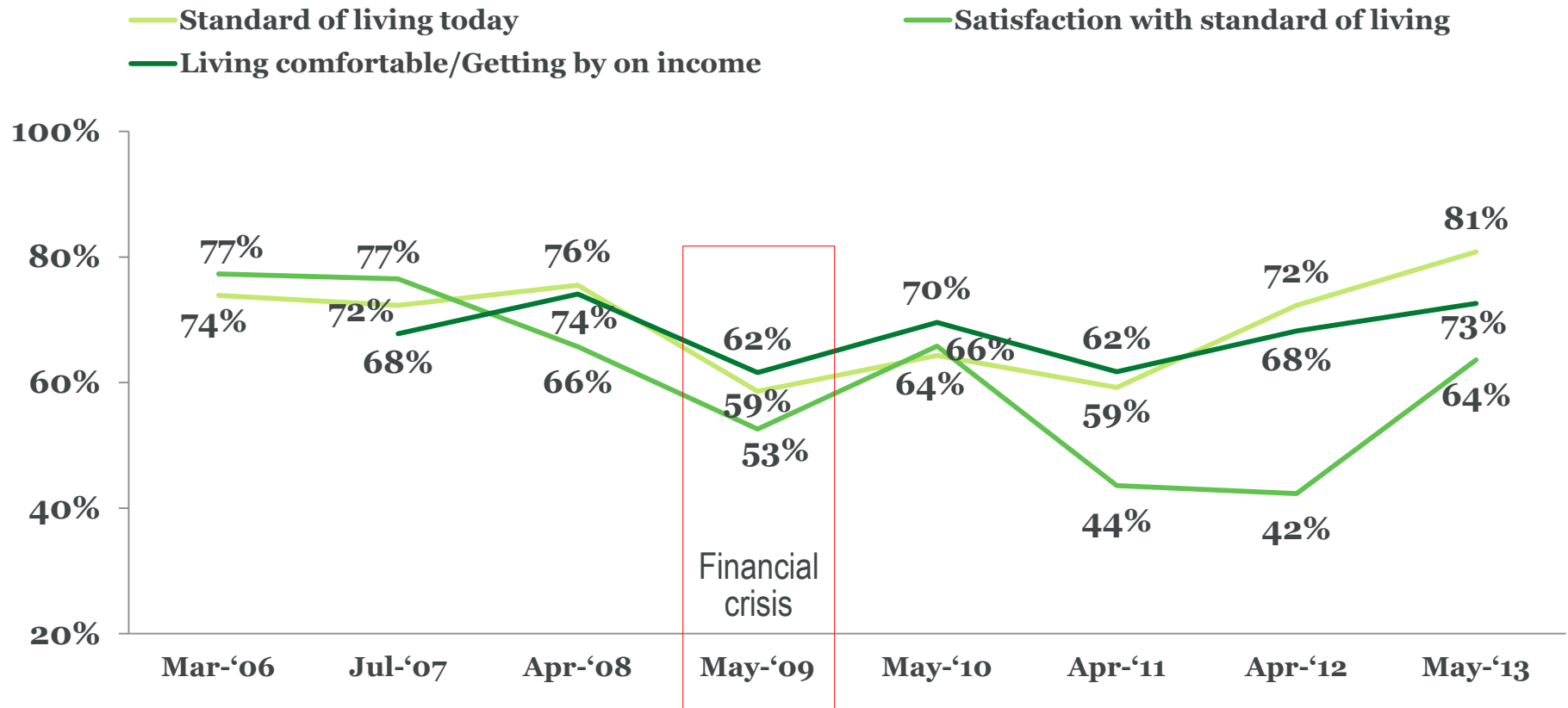
- Russia
- Learn more about the BBG Research series at <http://j.mp/UjCmJb>

Have a question? Contact us at 202-203-4400 or pubaff@bbg.gov

Appendix

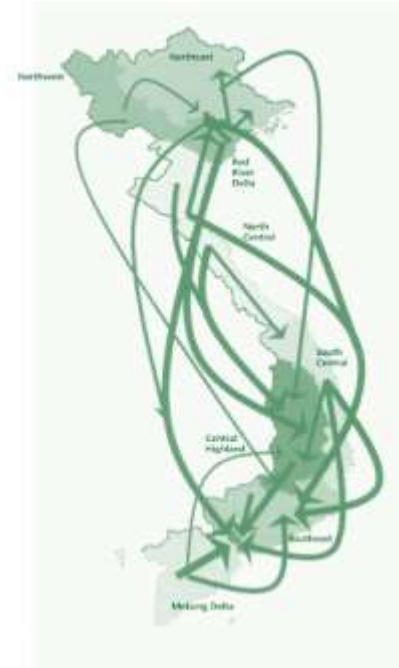
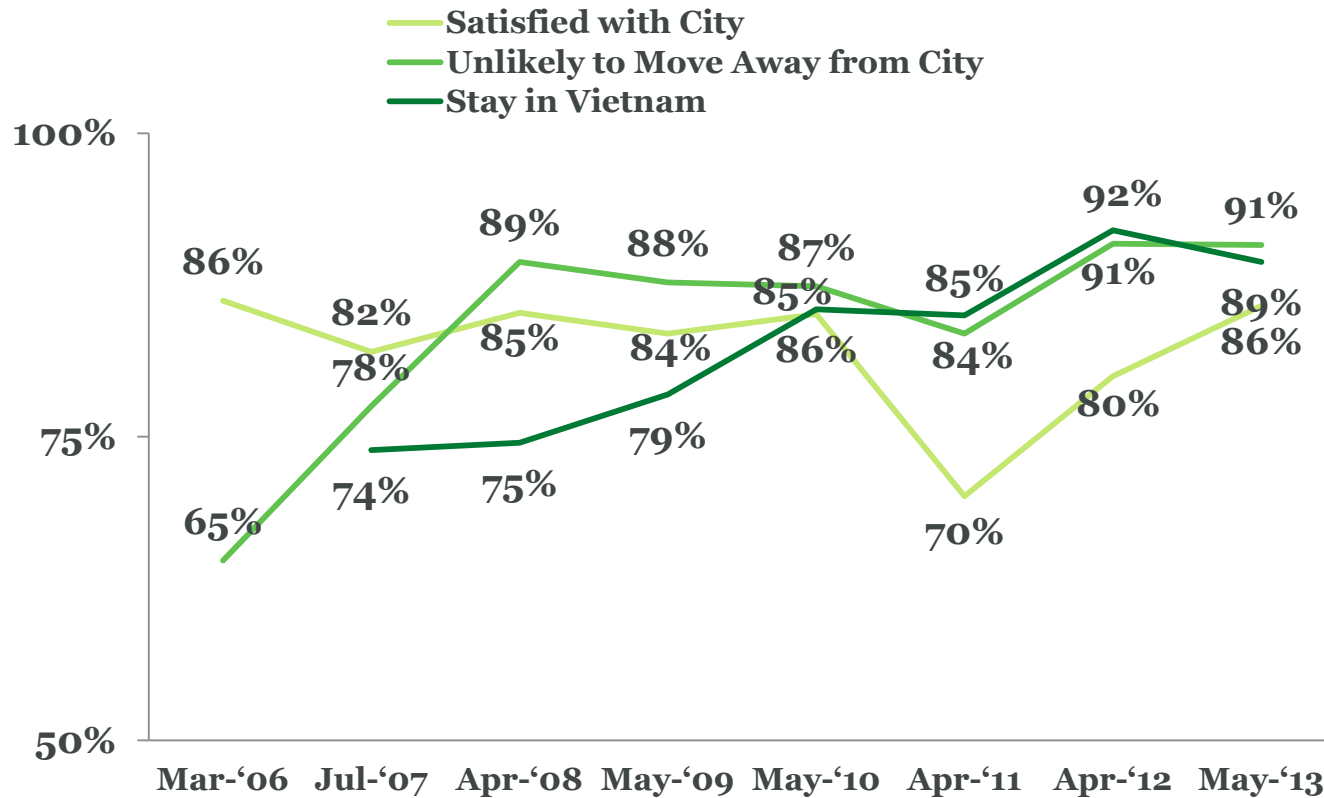
Recent Improving Standard of Living and Satisfaction – and Better Ability to Live on Present Income

Are you satisfied or dissatisfied with your standard of living, all the things you can buy and do? (%Satisfied)
Right now, do you feel your standard of living is getting better or getting worse? (%Better)
Which one of these phrases comes closest to your own feelings about your household's income these days?



Vietnamese Report Satisfaction With Their City and Desire to Stay Living Where They are

*Are you satisfied or dissatisfied with the city or area where you live? (%Satisfied)
In the next 12 months, are you likely or unlikely to move away from the city or area where you live?*



Residents Have Strong Communities with Sound Support Structures and Opportunities for Friends

If you were in trouble, do you have relatives or friends you can count on to help you whenever you need them, or not? (% Yes)

The opportunities to meet people and make friends? (% Satisfied)

